



Protect My Ministry Planning Center 2.0 Integration

This guide offers a comprehensive overview of how to install and use the PMM 2.0 Integration with Planning Center People. Our plugin simplifies the process of conducting background checks and managing child safety training, ensuring compliance with necessary regulations. By following the outlined steps, users can easily navigate the system, submit individual or bulk background check requests, and access essential reports and tracking features.

Base Packages

1 Background Check Packages

- **Essential:** Suitable for low-risk roles such as parking lot attendants and greeters.
- **Advanced:** Recommended for roles involving children, such as camp leaders and youth ministry leaders.
- **Premier:** Suggested for high-risk roles involving sensitive information.

Our Base Packages

*Prices do not include state, court, or other search fees.

Essential

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ One Countywide Criminal Search (Auto Populated)

Advanced

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ Unlimited Countywide Criminal Search (Auto Populated - 7 yrs)

Premier

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ Unlimited Countywide Criminal Search (Auto Populated - 7 yrs)
- ✓ Unlimited Federal by District Search (Auto Populated - 7 yrs)

2 Popular Add-Ons

- Motor Vehicle Report
- Credit Report
- Federal District Criminal Record Search
- Education Verification
- Employment Verification



Create unlimited custom packages in your [PMM Portal](#)

3 Child Safety Training

Lessons:

1. Defining Child Sexual Abuse
2. Victim Behavioral Characteristics
3. Characteristics of Child Molesters
4. Make a Difference
5. Reporting
6. Prevention
7. Policies & Procedures

Training Types:

- **Volunteer** : Lessons 1-5, 30-minute video
- **Employee** : Lessons 1-7, 1-hr video
- **Employee-Spanish** : Lessons 1-7, 1-hr video

Enabling the PMM 2.0 Integration

4 Click "Integrations"



Church Information

Mailing Address

Localization

Church Center

Church Campuses

Integrations

Church Email

Website

Church Phone Number

Tax ID Number



5

To find and enable the new Protect My Ministry integration with People, navigate to your account settings.

The screenshot shows a software dashboard with a blue header. The header contains a 'home' dropdown menu, 'Dashboard', and 'Tasks' buttons. The 'home' dropdown is open, showing options for 'home', 'people', and 'Account settings' (which is circled in orange). Below the header, there is a 'profiles' section with a list of user cards. Each card includes initials in a circle, a name, and a status (e.g., 'Mon'). The cards are: DD Dasher Dancer Mon, BJ Betty Johnson Mon, MG Mr Grinch Mon, LB Little Billy Mon, JJ Jane Johnson Mon, RR Rudolph Rednose Mon, SC Santa Claus Mon, MH Mary Lou Hoo Mon, JD John Doe Mon, and JB Jack Black Oct 25. To the right, there is a 'My workflow cards' section with a 'Background Checks' card for 'Emily Parbhoo' with the step 'Background'.

6

Click "Connect" on the 2.0 Protect My Ministry integration.

Integrations

Integrations connect your Planning Center account with other software. Integrations allow systems to talk to each other, enabling you to get all your work done in one place.

[Add-ons](#) External connections

2.0 Protect My Ministry testing

<https://horizon-web-test1.protection-services.com/>

2.0 Protect My Ministry

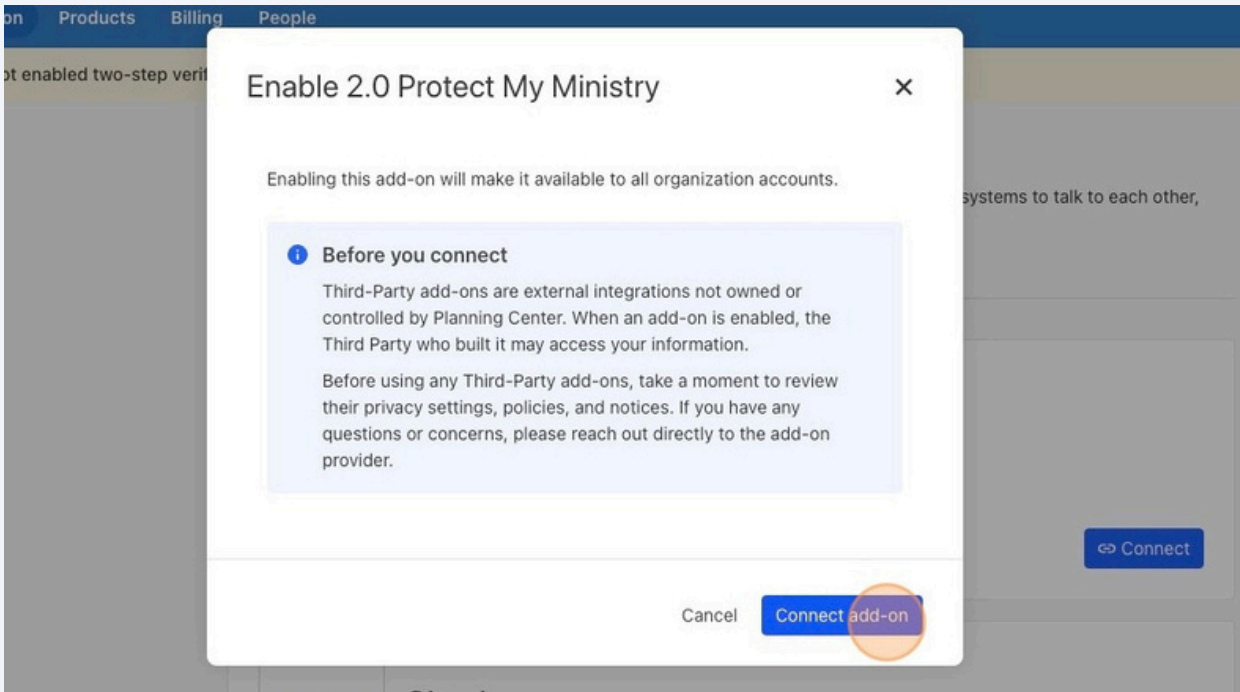
[Connect](#)



Checkr

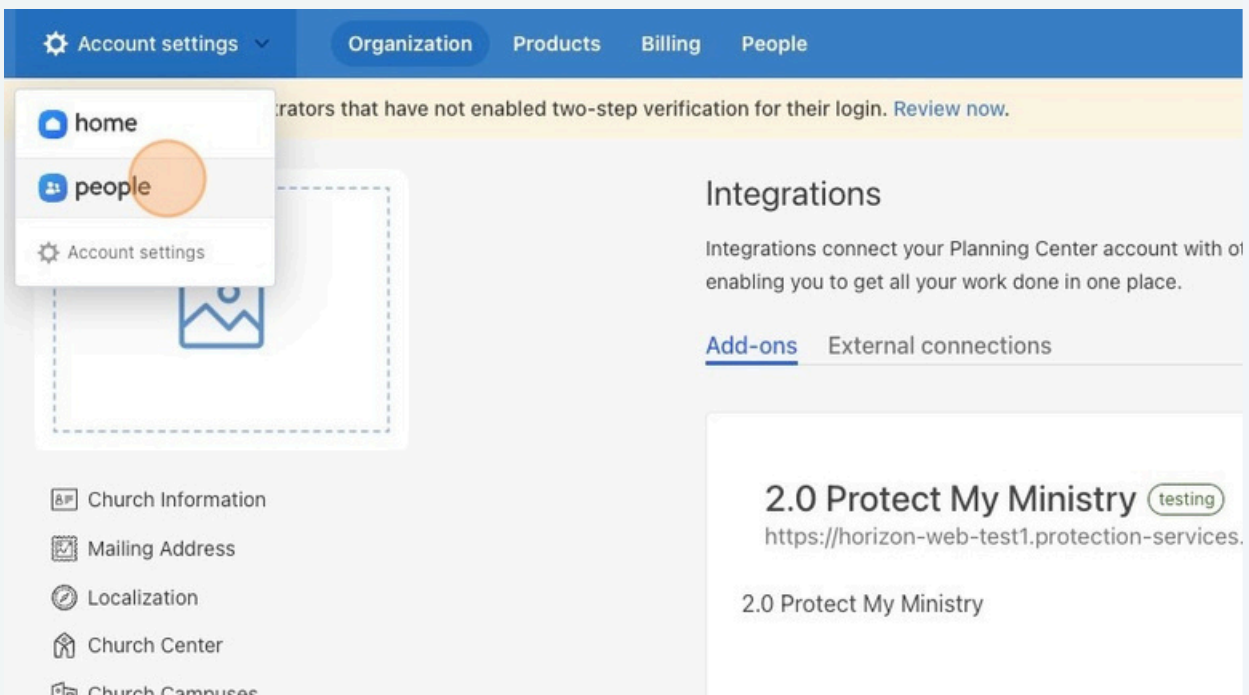


7 Click "Connect add-on"



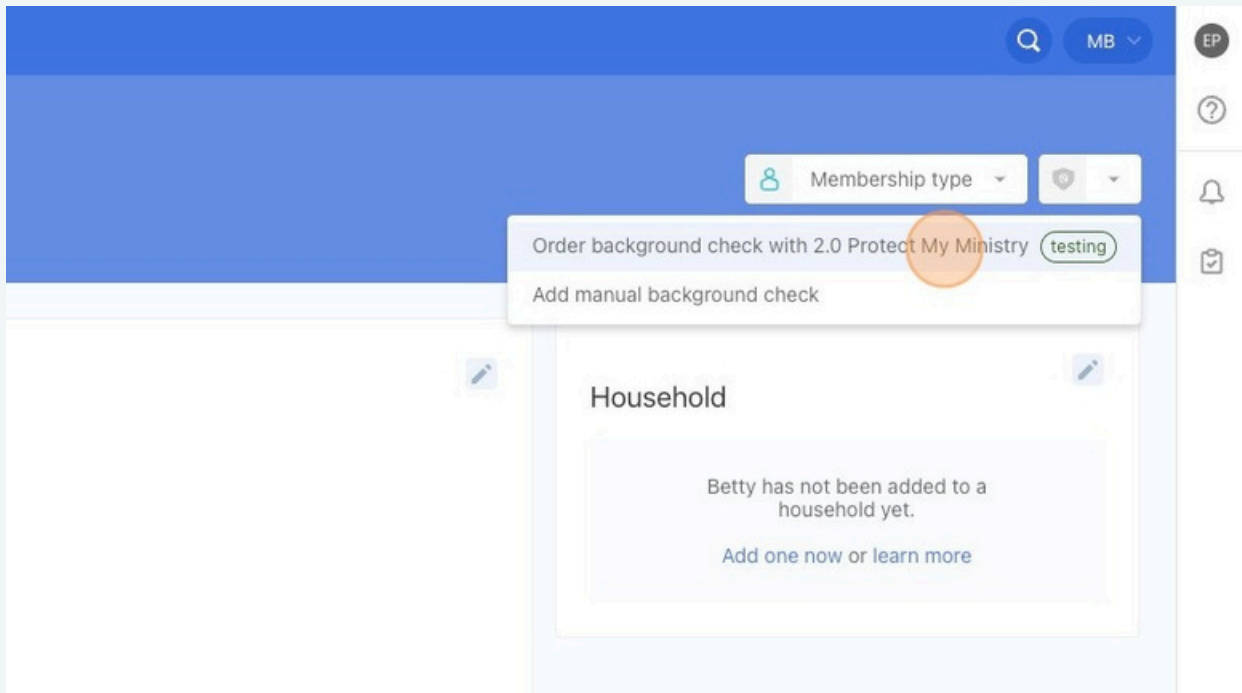
You're not done yet! Regardless of if you are a NEW or EXISTING customer of Protect My Ministry, you must complete the PMM signup form before you use the integration.

8 Once the integration is connected, you now have to authenticate your PMM and PCO accounts. Navigate to any person profile, or the background check dashboard.

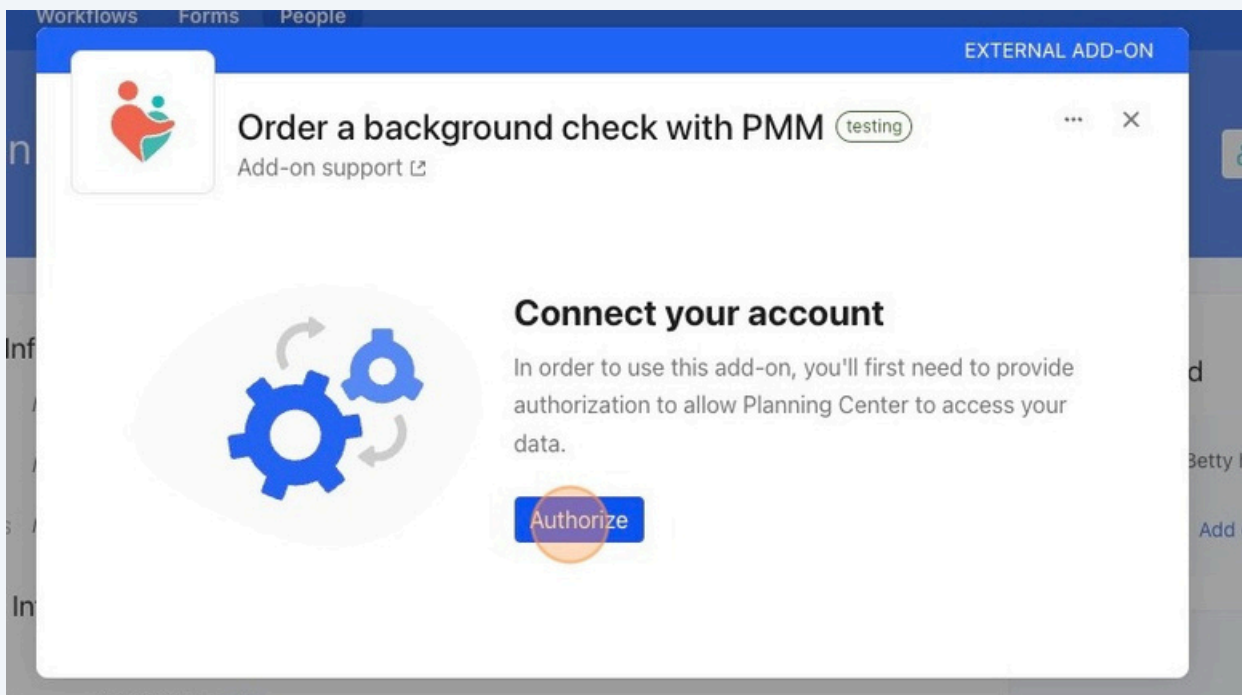




- 9 Click "Order background check with 2.0 Protect My Ministry" in the person's profile or "New background check" in the background check dashboard.

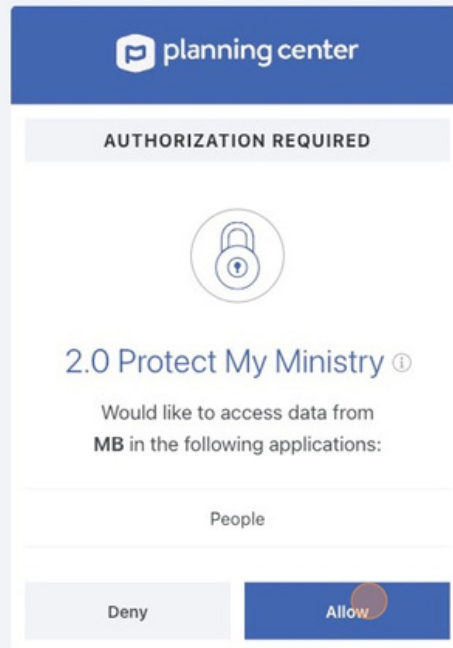


- 10 Click "Authorize"





11 Click "Allow".



12 Enter your PMM credentials you received after completing signup. If you have not completed the signup form, use this link or select the "Create Account" link on the screen. You will not be able to authorize the integration until signup has been completed.



You won't be able to start ordering background checks until your account has been credentialed. Once you have been approved and set up, you will receive an email from PMM.



Ordering Background Checks and Safety Training - Single Order

13 In the integration, you can select your screening package, state where employment will occur, and add a Safety Training to the order if desired.

If you aren't sure which screening level is right for the applicant, or you need to see the services included in each, you can click "Compare Levels" to be taken to the PMM portal packages page.

At any point in using the integration, you can click "Go to Protect My Ministry" to visit your [PMM Portal](#).

The screenshot displays a web interface for ordering a background check. The main window is titled "Order a background check with PMM" and includes a "testing" badge. Below the title, there are navigation links for "Invite Details" and "Review & Send". The form is titled "Start a Background Check Invite" and contains the following fields:

- Screening Level***: A dropdown menu with the text "Select level" and a "Compare Levels" link.
- Volunteering Location***: A dropdown menu with the text "Where will employment / volunteering take place?" and the value "Georgia".
- Add Child Safety Training (Optional)**: A dropdown menu with the text "Safety Training is enabled on your account. Simply add it to your invite." and the value "No Safety Training".

At the bottom of the form, there is a "Go to Protect My Ministry" link and a blue "Continue" button. The background shows a user profile for "Betty Johnson" with contact information and a membership type dropdown.



- 14 Clicking "Screening Level" will show you the active base packages as well as any custom packages in your account.

Screening Level* [Compare Levels](#)

Select level

CUSTOM SCREENINGS

- 2 County Auto
- GCIC
- Preferred
- Premier + MVR Custom Package

SCREENING LEVELS

- Essential
- Premier

Go to Protect My Ministry [Continue](#)

- 15 The Volunteer Location will be pre-populated with the state of residency for the ordering user. It can be changed to any U.S. state and should be updated to reflect the state where employment or volunteering will occur.

EXTERNAL ADD-ON

Order a background check with PMM testing

Add-on support

Invite Details > Review & Send

Start a Background Check Invite

Screening Level* [Compare Levels](#)

Essential

Volunteering Location* [Where will employment /volunteering take place?](#)

Georgia

Add Child Safety Training (Optional)

Safety Training is enabled on your account. Simply add it to your invite.

No Safety Training



- 16** If desired, add Child Safety Training to the order. The applicant will receive a separate link via email to complete this training.

Screening Level* [Compare Levels](#)

Essential

Volunteering Location*
Where will employment / volunteering take place?

Georgia

Add Child Safety Training (Optional)
Safety Training is enabled on your account. Simply add it to your invite.

No Safety Training

- Employee
- Volunteer
- Employee - Spanish
- ✓ No Safety Training

Go to [Continue](#)

- 17** Once all required fields have been completed, click "Continue".

Essential

Volunteering Location*
Where will employment / volunteering take place?

Georgia

Add Child Safety Training (Optional)
Safety Training is enabled on your account. Simply add it to your invite.

Employee

Go to Protect My Ministry [Continue](#)

- 18 On the next screen, you can expand and view the invite details to see what screening level and safety training may have been selected. You will also be required to input the applicant's email if one does not exist in their profile.

The screenshot displays the 'Review Invite Details' form for Betty Johnson. The form is titled 'Order a background check with PMM' and includes a 'testing' label. The 'Invite Details' section shows the applicant's name, 'Johnson, Betty', and their status as 'Essential' and 'Child Safety Training (Employee)'. An email field is present but redacted with an orange circle, and a red error message below it states 'A valid email address is required.' Below the email field is a section for 'Add Billing Reference (Optional)' and a section for 'Sign FCRA Certification*'. The background shows the user profile for Betty Johnson with contact and personal information.

- i** If the applicant wishes to have the invite(s) sent to a different email address than the one saved in their profile, you can change it in the invite details section without it updating in their profile.



19

When adding a billing reference, you can select from pre-made references set up in your [PMM Portal](#) or you can create a new reference.

- Child Safety Training (Employee)

+ Add Billing Reference (Optional)

Select from your existing references

Select Billing Code

Create a new reference

Sign FCRA Certification*

Fair Credit Reporting Act – Client Certification

By requesting a background check report from Protect My Ministry you certify the following:



Creating a new reference in the order will NOT save to your list of custom billing references in the PMM Portal. If you wish to reuse this reference, it will need to be created in the [PMM Portal](#).

20

The last step is to review and sign the FCRA Certification. You will not be able to send the invite until the certification has been made.

Fair Credit Reporting Act – Client Certification

By requesting a background check report from Protect My Ministry you certify the following:

- You have provided the job applicant/volunteer with a clear and conspicuous disclosure advising them that a background check report may be obtained for employment/volunteer purposes and have received their authorization to obtain the report;
- You will comply with any adverse action requirements as described in the Fair Credit Reporting Act, if applicable (15 U.S.C. § 1681b(3) and 1681m(a)); and
- You will not use information contained in the background check report in violation of any applicable Federal or State equal employment opportunity law or regulation.

Click here to certify that you have secured authorization and will adhere to these legal requirements

Go to Protect My Ministry

Send Invite



21 Click "Send Invite"

employment/volunteer purposes and have received their authorization to obtain the report;

- You will comply with any adverse action requirements as described in the Fair Credit Reporting Act, if applicable (15 U.S.C. §§ 1681b(3) and 1681m(a)); and
- You will not use information contained in the background check report in violation of any applicable Federal or State equal employment opportunity law or regulation.


Click here to certify that you have secured authorization and will adhere to these legal requirements


Go to Protect My Ministry

Send Invite

22 Upon successful completion of an order, you can close the integration modal or visit the [PMM Portal](#).

EXTERNAL ADD-ON

 Order a background check with PMM (testing) ... X
Add-on support



Your invite email has been sent!

An email has been sent to the selected candidates with an invite to a background check [and safety training]. You can track the status of the check on Planning Center.

Want to explore more? Visit your [Protect My Ministry](#) account to create custom invites, packages and more!

Go to Protect My Ministry



Ordering Background Checks & Safety Training - Bulk Order

23

From the background check dashboard, select "New Background Check".

The screenshot shows the 'Background checks' dashboard. At the top, there are tabs for 'Overview', 'Metrics', 'Profile notes', and 'Background checks'. A 'New background check' button is circled in orange. Below the tabs, there are four status filters: 'RECENTLY EXPIRED INVITATIONS' (0), 'CONSIDER' (0), 'EXPIRING SOON' (0), and 'RECENTLY EXPIRED' (0). A search bar is present with the text 'Current checks only' and 'Search by name...'. Below the search bar, there is a table with 15 background checks.

FIRST NAME	LAST NAME	CREATED BY	CREATED DATE	SOURCE	CHECK STATUS	STATUS UPDATED DATE	EXPIRATION DATE	COMPLETED DATE
Betty	Johnson		11/20/2024	2.0 Protect My Ministry	Report processing	11/20/2024	05/21/2025	
Mr	Grinch		11/20/2024	2.0 Protect My Ministry	Report processing	11/20/2024	05/21/2025	
Santa	Claus		11/20/2024	2.0 Protect My Ministry	Awaiting applicant	11/20/2024	05/21/2025	
Chris	Beard		11/19/2024	2.0 Protect My Ministry	Awaiting applicant	11/20/2024	05/20/2025	
Dasher	Dancer		11/19/2024	2.0 Protect My Ministry	Awaiting applicant	11/19/2024	05/20/2025	
Chris	Beard 2		11/18/2024	CBEARD TOKEN	Report processing	11/18/2024		
Jack	Black	Emily Parbhoo	10/30/2024	Manual	Complete (Clear)	10/23/2024	10/30/2026	10/23/2024
Weston	Neal	Jo Lopez	10/01/2024		Complete (Not clear)	10/01/2024	10/01/2026	10/01/2024

24

You can search and add as many applicants as you want to your order.

The screenshot shows the 'Protect My Ministry' add-on interface. The title is 'Protect My Ministry (testing)'. Below the title, there are three steps: 'Add Candidates', 'Invite Details', and 'Review & Send'. The 'Select Candidates*' step is active, with the question 'Who are you inviting to a background check?'. A search bar contains the text 'rud'. Below the search bar, a dropdown menu shows a candidate: 'Rudolph Rednose' with a profile picture 'RR' and the text 'No email No phone'. Below the dropdown, there is a text field with the name 'Dasher, Dasher' and the email 'dasher@gmail.com'. Below the text field, there is a 'Volunteering Location*' section with the question 'Where will employment / volunteering take place?' and a dropdown menu showing 'Georgia'.



25

Ensure the volunteering/employment location is correct, or update and then click "Continue".

The screenshot shows the 'Protect My Ministry' external add-on interface. The main window is titled 'Protect My Ministry (testing)' and has a sub-header 'Add-on support'. Below this, there are navigation links: 'Add Candidates', 'Invite Details', and 'Review & Send'. The 'Select Candidates*' section asks 'Who are you inviting to a background check?' and shows a search bar with 'Mary Healy' entered. Below the search bar, there are three contact entries: 'Healy, Mary' with email 'mary.healy@ministrybrands.com', 'Rednose, Rudolph', and 'Dancer, Dasher' with email 'dasher@gmail.com'. The 'Volunteering Location*' section asks 'Where will employment / volunteering take place?' and has a dropdown menu with 'Delaware' selected. At the bottom right, there is a 'Continue' button highlighted with an orange circle.

26

Select the desired screening level and safety training and click "Continue".

The screenshot shows the 'Protect My Ministry' external add-on interface. The main window is titled 'Protect My Ministry (testing)' and has a sub-header 'Add-on support'. Below this, there are navigation links: 'Add Candidates', 'Invite Details', and 'Review & Send'. The 'Start a Background Check Invite' section has a 'Screening Level*' dropdown menu set to 'Premier' and a 'Compare Levels' link. Below this, there is a section for 'Add Child Safety Training (Optional)' with a note 'Safety Training is enabled on your account. Simply add it to your invite.' and a dropdown menu set to 'Volunteer'. At the bottom right, there is a 'Continue' button highlighted with an orange circle.

27

Once you have reviewed the invite details, ensuring each applicant has a valid email, added a billing reference if desired, and signed the FCRA Certification, you can click "Send Invite" to place the order.

The screenshot displays a software interface for managing background checks. A modal window titled "Review Invite Details" is open, showing the following sections:

- Invite Details**: A dropdown menu.
- Add Billing Reference (Optional)**: A dropdown menu.
- Sign FCRA Certification***: A section containing a box titled "Fair Credit Reporting Act - Client Certification".

The "Fair Credit Reporting Act - Client Certification" box contains the following text and requirements:

By requesting a background check report from Protect My Ministry you certify the following:

- You have provided the job applicant/volunteer with a clear and conspicuous disclosure advising them that a background check report may be obtained for employment/volunteer purposes and have received their authorization to obtain the report;
- You will comply with any adverse action requirements as described in the Fair Credit Reporting Act, if applicable (15 U.S.C. §605, 1681b(3) and 1681m(a)); and
- You will not use information contained in the background check report in violation of any applicable Federal or State equal employment opportunity law or regulation.

Below the list, there is a checkbox labeled "Click here to certify that you have secured authorization and will adhere to these legal requirements" which is checked.

At the bottom of the modal, there is a "Go to Protect My Ministry" link and a "Send Invite" button, which is highlighted with a red circle.

In the background, a table of background checks is visible with columns for "FIRST NAME", "LAST NAME", "CREATED", "EXPIRATION DATE", and "COMPLETED DATE".



Tracking Orders

- 28** The background check badge in their profile will display the following statuses. You can also see the status description per applicant in the background check dashboard.

Status	Tags	Icons
Awaiting applicant	Awaiting applicant	[Icon]
Report processing	Report processing	[Icon]
Needs review	Needs review	[Icon]
Expired invitation	Expired invitation	[Icon]
Complete (Not clear)	Complete (Not clear)	[Icon]
Complete (Clear)	Complete (Clear)	[Icon]
Canceled	Canceled	[Icon]

- 29** After you place an order with PMM, the background check badge will update colors based on where it is in the process. You can also click the badge icon to see more details about the order.

The screenshot shows a user profile page with a blue header. A tooltip is displayed over a badge, showing the following information:

- Awaiting applicant — View details
- Invitation sent 11/20/2024
- Order background check with 2.0 Protect My Ministry (testing)
- Add manual background check

Below the tooltip, a message states: "Betty has not been added to a household yet." with a link to "Add one now or learn more".



30

From the background check dashboard, you can filter different statuses and see a list of all ordered background checks.

RECENTLY EXPIRED INVITATIONS CONSIDER EXPIRING SOON RECENTLY EXPIRE

☰ 0 ☰ 0 ☰ 0 ☰ 0

Filter ☰ Current checks only Search by name...

15 Background checks

FIRST NAME	LAST NAME	CREATED BY	CREATED DATE	SOURCE	CHECK STATUS	STA1
Betty	Johnson		11/20/2024	2.0 Protect My Ministry	Report processing	11/20
Mr	Grinch		11/20/2024	2.0 Protect My Ministry	Report processing	11/20
Santa	Claus		11/20/2024	2.0 Protect My Ministry	Awaiting applicant	11/20
Chris	Beard		11/19/2024	2.0 Protect My Ministry	Awaiting applicant	11/20



Safety Training tracking does NOT appear with the background check tracking.

31

To view Safety Training, click the Notes sections of the person's profile. Here, you will see a new entry every time the status updates for their training.

The status will remain 'In Progress' until they successfully complete and pass the training quiz.

SC Santa Claus Actions Membership type

contact@chrisbeard.io

- Profile
- Activity
- Communication
- Workflows
- Notes
- Forms

Notes

Filter notes by: All categories

Child Safe

Training for Santa Claus
Request ID: b6b9d653-9440-45e1-89af-bbf684c1e076
Timestamp: 11/20/2024
Status: Completed
Score: 90

Certificate URL: <https://horizon-web-test1.protection-services.com/training/certificate/b6b9d653-9440-45e1-89af-bbf684c1e076/False>

Nov 20, 2024 by Chris Beard 2

Child Safe


Training for Santa Claus
Request ID: b6b9d653-9440-45e1-89af-bbf684c1e076
Timestamp: 11/20/2024
Status: InProgress

Nov 20, 2024 by Chris Beard 2



32

Training will not be marked complete until the applicant has clicked "View Certificate"!



Results

100%
25/25 Correct

[Retake Exam](#) [View Results](#) [View Certificate](#)



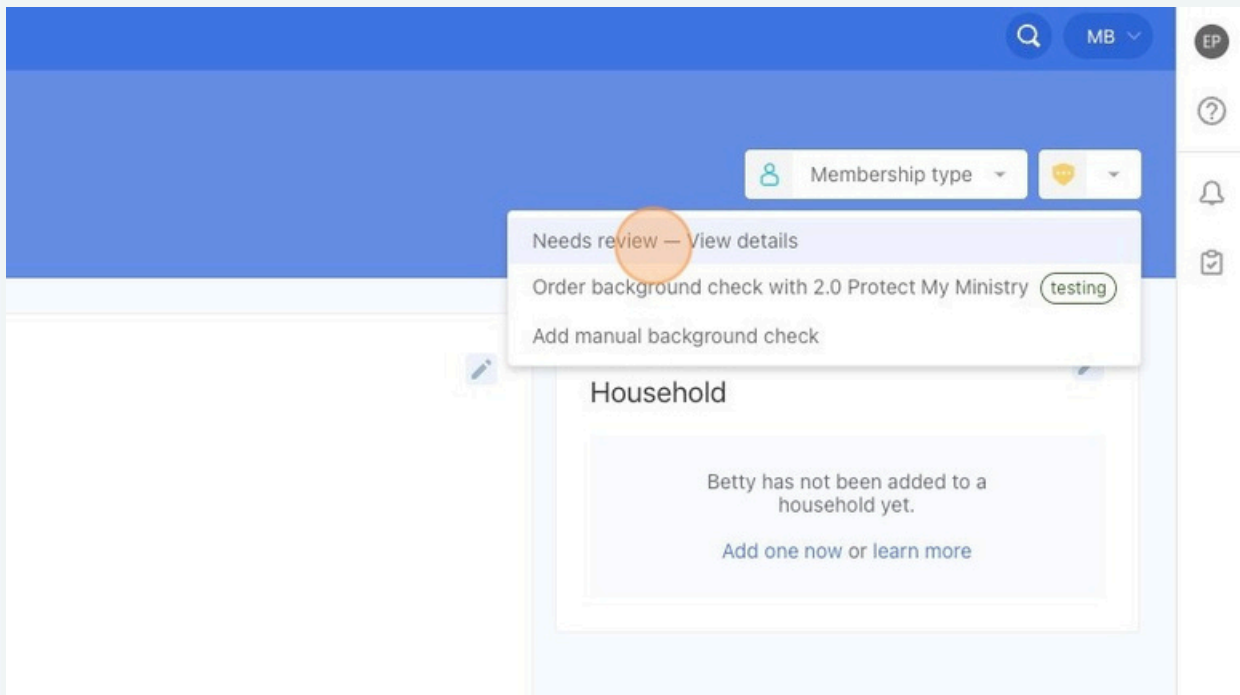
If an applicant's training shows a status of 'In Progress' but they confirmed they completed it, and passed, instruct them to revisit their training link and select "View Certificate".



Reviewing Background Check Results

33 Once a background check report has been completed, you will be notified via email. You can click the link in the email to view the report, or you can navigate to the report through the individual's profile in Planning Center.

Click the badge icon to see the status of the report and then click View Details.



Enroll into our auto-assessment feature to have PMM automatically mark applicants as Clear when no records return on their report. This is a paid feature. Contact compliance@protectmyministry.com to learn more!



34 If you are not enrolled into auto-assessments, all reports will come back with a 'Needs Review' status. To view a report and make an assessment, click the hyperlink source '2.0 Protect My Ministry' in the view details modal.

The screenshot shows a 'View details' modal window. At the top left, it says 'View details' with a close button (X) on the right. Below this is a section titled 'Current status'. On the left, there is a yellow box with a warning icon and the text 'Needs review'. To the right, there are two fields: 'Completed:' with the date '11/20/2024' and 'Source:' with the text '2.0 Protect My Ministry'. An orange circle highlights the source text. Below the source field is a 'Show note' button. At the bottom right of the modal is a 'Close' button. The background shows a blurred interface with tabs for 'Workflows', 'Forms', and 'People', and a sidebar with 'Actions' and 'Person Information'.

35 If you are not enrolled into auto-assessments, all reports will come back with a 'Review' status. To view a report and make an assessment, click on 'Review' in the assessment column and then Edit Assessment.

The screenshot shows a table with 9 rows. Each row has a 'View' button, a date '10/17/2024', a status, another 'View' button, and an assessment button. The status for the first row is 'Pending' (yellow box), and for the others is 'Completed' (green box). The assessment buttons for the 'Completed' rows are 'Eligible' (green box). The 'Review' button for the last row is highlighted with an orange circle, and a tooltip 'Edit Assessment' is visible over it. At the bottom right, it says 'Showing 1-9 of 9'.

com	View	10/17/2024	Pending	View	
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Eligible
com	View	10/17/2024	Completed	View	Review
com	View	10/17/2024	Completed	View	Review



- 36** From here, you can view the report and determine if the applicant is Eligible for the role or if it should be Escalated for further review within your organization. Make sure you save changes to the assessment.

The screenshot shows a web application interface. On the left, there is a report viewer with a toolbar at the top showing '46%' zoom, a plus sign, a refresh icon, a download icon, a print icon, and a menu icon. The report content includes the 'PROTECT' logo, report details, applicant information, and a table of search results.

Search ID	Service	Preferred	Status
284814M	SSN Trace - No reportable address history found		PROCESSED

Below the table, there is a disclaimer and a 'RECOMMENDATION Clear' link.

On the right, there is an 'Assessment' control panel with three radio buttons: 'Review' (blue), 'Eligible' (green, selected), and 'Escalate' (red). Below these buttons is a blue 'Save Assessment' button.

- 37** Your assessment will then be reflected in their Planning Center profile.

The screenshot shows a user profile page. At the top, there is a blue header with a search icon, 'MB', and a user icon 'EP'. Below the header, there is a 'Membership type' dropdown menu with a green checkmark and a red circle around it. Below the membership type, there is a message box that says 'Jack has not been added to a household yet.' and a link 'Add one now or learn more'.



PMM Portal Instructions

38 Click "Packages"

The screenshot shows the PROTECT MY MINISTRY portal interface. On the left is a dark sidebar with navigation items: Background Checks, Child Safety, Packages (highlighted with a red circle), Support, and a COLLAPSE button. The main content area is titled 'Background Checks' and features three summary cards: 'New Results' (0), 'Alerts' (0), and 'Due for Rescreen' (0). Below these are search filters for 'Search', 'Status' (set to 'All'), and 'Assessment' (set to 'All'). There is also a '0 selected' indicator and an 'Archive' button. At the bottom, a table header is visible with columns: Name, Email, Authorization, and Date Re.

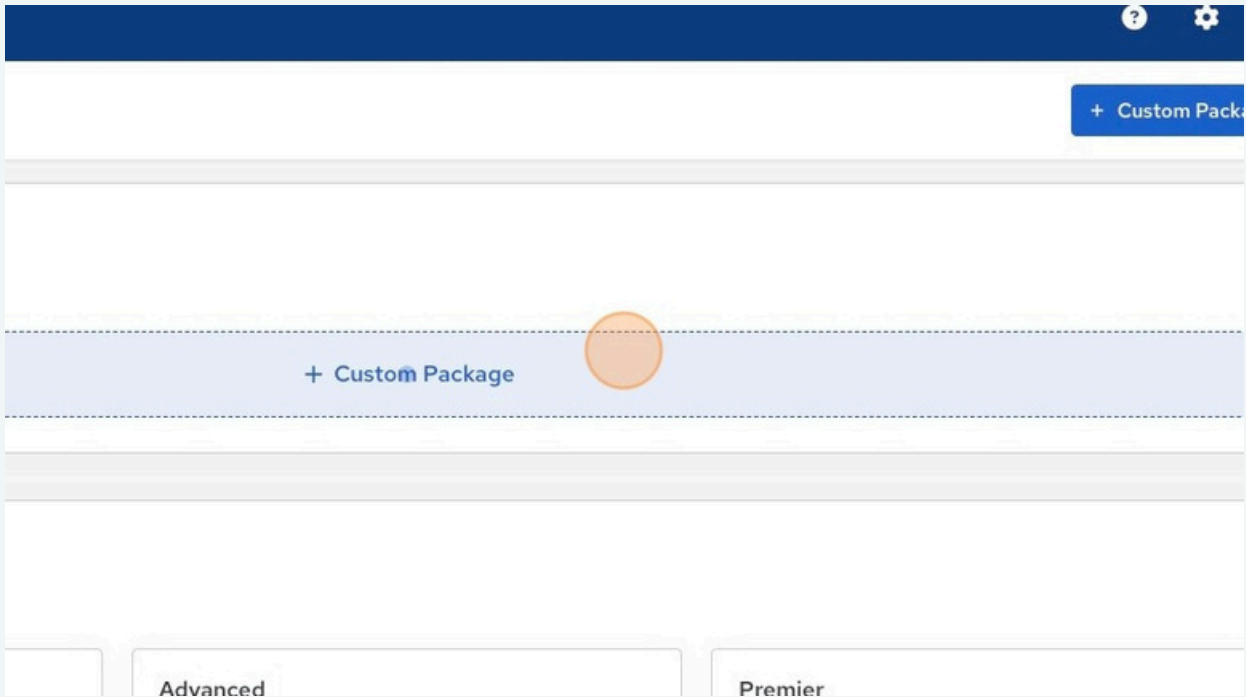
39 Here you can view our base packages and add-on services. You can also deactivate packages that your organization doesn't use, they can be reactivated at any point.

The screenshot displays the 'Our Base Packages' section. At the top, there is a '+ Custom Package' button. Below it, three package cards are shown: 'Essential', 'Advanced', and 'Premier'. Each card lists services with checkmarks and includes an 'Active' toggle switch. The 'Essential' package includes: Multistate Criminal Search, National Sex Offender Registry, SSN Trace, Automatic re-verification of records and possible records, and One Countywide Criminal Search (Auto Populated). The 'Advanced' package includes: Multistate Criminal Search, National Sex Offender Registry, SSN Trace, Automatic re-verification of records and possible records, and Unlimited Countywide Criminal Search (Auto Populated - 7 yrs). The 'Premier' package includes: Multistate Criminal Search, National Sex Offender Registry, SSN Trace, Automatic re-verification of records and possible records, Unlimited Countywide Criminal Search (Auto Populated - 7 yrs), and Unlimited Federal by District Search (Auto Populated - 7 yrs). At the bottom left, a 'View Add-Ons' link is highlighted with a red circle.



i For pricing information, refer to your proposal. If you need assistance in locating your pricing, reach out to sales@protectmyministry.com or support@protectmyministry.com

40 To create a custom package, click '+ Custom Package'





41

Name your package something that will help you identify when it should be used. You could also put the pricing (obtained from your proposal) in the title for easy reference.

1 Name → 2 Base Package → 3 Add-Ons

What would you like to name this package?

Vacation Bible School

Tip: Use a name that will help you remember the purpose of this package and its searches, as it will be the package name that appears when selecting your orders. This package name will not appear in reports.

CREATE >

42

Click here.

Choose your Base Package

	Essential	Advanced	Premier
	Selected	Select	Select
Multi-State Criminal Search	✓	✓	✓
National Sex Offender Registry Search	✓	✓	✓
SSN Trace	✓	✓	✓
County-wide Criminal Search (Auto-Populated - 7 years)	One	Unlimited	Unlimited
Federal by District Search (Auto-Populated - 7 years)	-	-	Unlimited

I do not wish to have a base package as part of this custom package

Summary

NAME
Vacation Bible School

Base Package

Essential Package

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possibl records
- ✓ One Countywide Criminal Search (Auto Popula

Continue to Add-Ons

*Mandatory state, court, or jurisdictional fees may



43 Click "Add" to all the services you want to add to your package.

Choose your Add-Ons

Motor Vehicle Records Search

^ Motor Vehicle Report + Add

Criminal Records Search

^ Federal Felony And Misdemeanor + Add

^ County Felony and Misdemeanor + Add

^ National Combo Search + Add

44 Click "Save Package"

+ Add

+ Add

+ Add

+ Add

Base Package

Essential Package

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ One Countywide Criminal Search (Auto Populated)

Add-Ons

Motor Vehicle Report ✕

Save Package

*Mandatory state, court, or jurisdictional fees may apply.



'Basic' packages containing limited services such as the Multistate Criminal Search, National Sex Offender Registry, and SSN Trace are NOT best practice.

It is not recommended to screen employees and volunteers with this level of screening as your risk for missed records is high.

For more information about the risks of using just a national criminal database search, visit our [blog post](#).

Account Settings

45

To access your account settings, click the settings gear in the top right. Under General settings you can set notifications, the time interval at which invitations should expire, rescreen intervals, retraining intervals, as well as upload your own logo to show in the UI and on email templates.

Account Settings

General Organization Details Profile Update Billing Billing References Agreements Invite Email Integrations

General

Notifications
Choose how and when we contact you. We may still send you important notifications about your account outside of your notification settings.

Notify me when...

- There are report updates
- An applicant invitation is sent
- An applicant invitation is expired

Applicant Invitation Expiry Interval
Choose when you want applicant invitation emails to expire after they are sent.

1 week

Rescreen Interval - Background Checks
Choose how often you want us to let you know an applicant needs to be rescreened.

6 months 1 year

Retraining Interval - Child Safety Training
Choose how often you want to be notified that an applicant needs to be retrained.

1 year 2 years 3 years

Logo Image
Upload a logo to be used in your communications. Logo must be smaller than 5MB and in the format of a PNG



If you're using an integration and the ChMS allows you to set a rescreen interval, it does not automatically update in the PMM Portal. Be sure to align the rescreen intervals across platforms for consistency.



46

To create, edit, and delete billing references, click the Billing References tab. Here you can create as many custom billing references as you'd like, as well as set a default billing reference.

The screenshot shows the 'Account Settings' page with the 'Billing References' tab selected. The page title is 'Billing References'. Below the title, there is a text box that says 'These codes can be used to tag background check orders by billing groups.' To the right of this text is a blue button with a plus sign and the text '+ New Code'. Below the text box is a form with a 'Title' label and a text input field. The input field contains the text 'No records to display.'

47

To view or edit Disclosures & Authorizations, select the Agreements tab. You can choose to use the default template provided by Protect My Ministry or create your own. Switch to Authorization by selecting the Authorization tab. Make sure you save any changes made.

The screenshot shows the 'Account Settings' page with the 'Agreements' tab selected. The page title is 'Agreements'. Below the title, there are two sub-tabs: 'Disclosure' and 'Authorization'. The 'Authorization' sub-tab is selected and highlighted with an orange circle. Below the sub-tabs, there are two sections: 'Preferences' and 'Text'. The 'Text' section has two radio buttons: 'Use Default Disclosure Text' (which is unselected) and 'Create Custom Disclosure Text' (which is selected). Below the radio buttons is a warning message: 'Please carefully review this text. You understand that any changes you make and save will be presented to your applicants and you are legally responsible for its content.' Below the warning message is a text editor with the title 'Custom Disclosure Text'. The text editor has a toolbar with various formatting options like bold, italic, underline, link, and font size. The font size is currently set to 16px.



48

To create, edit, or delete custom invite templates for Background Checks and Safety Trainings, select the Invite Email tab. You can also select one Background Check template and one Safety Training template to serve as the default template used on your invites.

Account Settings

General Organization Details Profile Update Billing Billing References Agreements **Invite Email** Integrations

Invite Email Templates ♥ Background Checks [+ Email Template](#)

This is the email your applicants receive when you invite them to complete a background check. Select "+ Email Template" to create and save custom email templates that suit your organization's needs.

Sort By Newest First

[+ Email Template](#)

Invite Email Templates ‡ Child Safety Training [+ Email Template](#)

This is the email your applicants receive when you invite them to complete a child safety training. Select "+ Email Template" to create and save custom email templates that suit your organization's needs.



49 When creating or editing an email template, ensure you title it in a way that will be informative of when it should be used.

In the body, you can add whatever content you like as long as it incorporated the tags noted below. These tags will automatically populate the corresponding information: Applicant's First Name, Applicant's Last Name, your organizations name, and the invitation link.

If you've added a logo to your account, you can include it in your email templates. Make sure you save any changes.

Edit Email

Customize the fields on the right to create an email for a specific use case.

Important
[ApplicantFirstName], [ApplicantLastName], [ClientName] and [InvitationLink] are required tags in the email body.

Email Template Name
Internal Use Only. Example: "Volunteer Email"

[ClientName]

From
message@mobilizemyministry.com

Subject Line
255 characters remaining

Insert logo as header
 Logo not found. Please upload a logo in the General tab.

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Text Color, Background Color, Font, Font size, Font color.



Background Check Dashboard

50 You can utilize the background check dashboard to easily filter for recently completed reports so you can view the report and make an assessment.

The screenshot shows the 'Background Checks' dashboard. On the left is a dark sidebar with navigation options: Background Checks (checked), Child Safety, Packages, Support, COLLAPSE, Admin, Home, and Error Log. The main content area is titled 'Background Checks' and features three summary cards: 'New Results' with a count of 9, 'Alerts' with a count of 13, and 'Due for Rescreen' with a count of 48. Below these are search and filter controls, including a search bar, a 'Status' dropdown set to 'All', and an 'Assessment' dropdown set to 'All'. There are also '0 selected' and 'Archive' buttons. A table below shows columns for 'Name', 'Email', and 'Authoriza', with one row visible for 'Jane Doe' with email 'janedoe@fakeperson.com'.

Safety Training Dashboard

51 The Child Safety dashboard allows you to track all of your safety trainings in one place.

The screenshot shows the 'Child Safety Training' dashboard. The left sidebar is identical to the previous dashboard, but the 'Child Safety' option is highlighted with a brown circle. The main content area is titled 'Child Safety Training' and features two summary cards: 'New Results' with a count of 3 and 'Due for Retraining' with a count of 0. Below these are search and filter controls, including a search bar and a 'Status' dropdown set to 'All'. There are also '0 selected', 'Cancel Training', and 'Archive' buttons. A table below shows columns for 'Name', 'Email', and 'Requestor', with one row visible for 'Mary Healy' with email 'mary.healy@ministrybrands.com'.



52 You can easily filter for recently completed trainings to view applicants' scores and certifications.

Child Safety Training

New certificates that have not been viewed yet

New Results **3** [View](#)

Due for Retraining **0** [View](#)

Q Search All [All](#)

0 selected [Cancel Training](#) [Archive](#)

Name	Email	Requestor	Date Requested	Status	Score
Mary Healy	mary.healy@ministrybrands.com	Mary Healy	11/21/2024 5:29:26 AM	Pending	0
Nidhi Patel	nidhi.patel@ministrybrands.com	Mary Healy	11/21/2024 5:29:26 AM	Pending	0
Jarrad Patel	jarrad.antczak@ministrybrands.com	Jarrad Antczak	10/31/2024 2:40:08 PM	Expired	0
Betty Johnson	emilygilgan@gmail.com	Emily Parbhoo	11/20/2024 9:21:15 AM	Pending	0
Santa Claus	contact@chrisbeard.io	Christopher Beard	11/20/2024 12:56:46 AM	Completed	80
Mr Grinch	chris.beard+grinch@ministrybrands.com	Christopher Beard	11/20/2024 1:51:29 AM	Pending	0
Chris Beard	chris.beard+pco-testing@ministrybrands.com	Christopher Beard	11/19/2024 11:48:29 PM	Pending	0
Dasher Dancer	dasher@gmail.com	Emily Parbhoo	11/19/2024 1:52:16 PM	Sent	0

53 Click "View"

Requestor	Date Requested	Status	Score	Certificate
Christopher Beard	11/20/2024 12:56:46 AM	Completed	80	View
Nidhi Patel	11/4/2024 10:30:40 AM	Completed	96	View
Jennifer Fowler	2/1/2024 6:57:45 AM	Completed	0	View



54 You can print the certification and save for your records.



55 Due for Retraining is another quick filter to easily identify who has expired training based on the expiry interval assigned.

Child Safety Training

New Results **3** Restore

Due for Retraining **0** View

Search Status: All

0 selected Archive

Name	Email	Requestor	Date Reques
Santa Claus	contact@chrisbeard.io	Christopher Beard	11/20/2024 12
California Order test1	nidhi.patel@ministrybrands.com	Nidhi Patel	11/4/2024 10:
Jennifer Fowler	jennifer.fowler@ministrybrands...	Jennifer Fowler	2/1/2024 6:5: